# Title: Freddy FSA CHN - November 2019

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| **Aspirations - Q4 2019 - mid quarter update** Freddy-Freshsales, CHN 21 Nov 2019 |
| Mission : Build an Intelligent CRM |

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| **Squad/Team-name-here** | **Name** | **Git Repo (if applicable)** |
| Freddy | [Jagadeesh Rajarajan](https://confluence.freshworks.com/display/~jagadeesh.rajarajan) | <https://github.com/freshdesk/freddy_deal_insights> |
| [Saicharan Rapolu](https://confluence.freshworks.com/display/~saicharan.rapolu) |
| [Sarthak Dev](https://confluence.freshworks.com/display/~sarthak.dev) |
| [Kadari Abhinav](https://confluence.freshworks.com/display/~kadari.abhinav) |
| [Shreeranjni Ramasubramanian](https://confluence.freshworks.com/display/~shreeranjni.ramasubramanian) |  |
| [Adarsh Dattatri](https://confluence.freshworks.com/display/~adarsh.dattatri) | <https://github.com/freshdesk/freddy_email_analysis> |
| [Rahulkumar Sharma](https://confluence.freshworks.com/display/~rahulkumar.sharma) |
| [Vishal Gupta](https://confluence.freshworks.com/display/~vishal.gupta) |
| Freshsales - QA | [Logesh Srinivasan](https://confluence.freshworks.com/display/~logesh.srinivasan) |  |
| Freshsales | [Sivalingam Selvasekaran](https://confluence.freshworks.com/display/~sivalingam.selvasekaran) |  |
| Freddy | [Swaminathan Padmanabhan](https://confluence.freshworks.com/display/~swaminathan.padmanabhan) |  |
| Freshsales - Product | [Aditi Balaji](https://confluence.freshworks.com/display/~aditi.balaji) |  |
| Freshsales - Product | Srivatsan |  |

## **Previous Aspirations Link:**

[Freddy FSA CHN - October 2019](https://confluence.freshworks.com/pages/viewpage.action?pageId=230067534)

## **Quarterly Goals:**

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| Goals | Status | Comments |
| Deal Insights lite   * All the accounts which do not have enough data to train an individual model, we will be build a global model clubbing accounts together. * Goal is to extend the feature to all customers who have at least 30 open deals (~1500 paying customers would qualify at the moment) | * We have our base model which is ~**70%** accurate. Working on improving the model's accuracy. * Changed the interpretability strings according to the new requirement. * **Timeline** : We are on track to enable lite model by Q4 2019. |  |
| Lead Scoring/Insights   * Build a ML based Lead scoring model to predict which leads are likely to convert into contacts or paying customers (we can be flexible based on customer's requirement). * Extending the deal insights (dynamic features) to leads and also adding lead level static features. | * Evaluated the existing rule based lead scoring & ML model. Results are shown below. * Exploring the lead scoring solutions provided by other CRM's as well as individual players like (Madkudu, Infer, etc). * **Timeline** :  Fix modelling & approach by Q4 2019. | * We wanted to evaluate how we perform compared to Madkudu. But, the table in which scores are stored are removed because legal team does not want to ingest this data in baikal. |
| Deal Sentiment   * Enable deal sentiment based tags for all Deal Insights (original) accounts | * Production status   + Live for account 47 : Tagging deals with positive mails     - Conv. Sentiment AUC : **0.89** (Based on NW-assigned tags)     - Conv. Sentiment AUC : **0.70** (Based on deal outcome) * Enabling for external accounts   + Clustering accounts with similar sales conversations     - Accounts within a cluster share sentiment model     - Explored clustering based on their customers' mails     - Notable patterns among clusters : Language, Industry and Regions   + Next steps:     - Train conversation sentiment models cluster-wise     - Train deal sentiment model account-wise     - Assign all eligible accounts to clusters and enable sentiment-based tags     - Surface sentiment directly via a **widget** (Q1) * R&D   + Exploring BERT for predicting conv. sentiment   + Built pipelines for offline experiments |  |
| Engineering   * Automating engineering workflow using AWS Sagemaker.          * Enable the deal insights feature to accounts in EU data center. | * For Sagemaker:   + Did an alpha test on staging for deal insights. Beta test with 3 production accounts next week.   + Deploy entire prediction pipeline (minus the ingestion) on AWS Lambda + Sagemaker by end of Q4 2019 * Work In Progress for setting up our tech stack in Europe (we are roughly at T-2 weeks). There are multiple parts to the setup:   + DB migration and sharding   + Stack duplication   + Setting up geo-based data pipelines |  |

Lead Scoring/Insights Evaluation :